

**Caution: DRAFT FORM**

This is an advance draft copy of a California tax form. It is subject to change and FTB approval before it is officially released.

If you have any comments on this draft form, you can submit them to us on our website at [www.ftb.ca.gov/forms/drafts/index.html](http://www.ftb.ca.gov/forms/drafts/index.html).

# California e-file Program Participant Enrollment Form

Skip the form – enroll online at [www.ftb.ca.gov](http://www.ftb.ca.gov)

<b>1</b>	<b>Application type</b>	<input type="checkbox"/> New	<input type="checkbox"/> Update	<input type="checkbox"/> Reinstatement
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<b>2</b>	<b>Participant name</b>	Name of sole proprietor, partnership, or corporation, as shown on tax return		
		Doing business as, if different from above		

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<b>3</b>	<b>Identification numbers</b>	EFIN	<input type="text"/>	ETIN	<input type="text"/>
		SSN/FEIN	<input type="text"/>		
		PTIN	<input type="text"/>		

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<b>4</b>	<b>Participant address</b>	Street			
	<b>(Mailing address)</b>	City	State	ZIP Code	
		Street			
	<b>(Physical address, if different from mailing address)</b>	City	State	ZIP Code	

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<b>5</b>	<b>Participant type</b>	<b>Individual</b>	<b>Business</b>
	(Check all that apply)		
	Electronic Return Originator	<input type="checkbox"/>	<input type="checkbox"/>
	Transmitter	<input type="checkbox"/>	<input type="checkbox"/>
	Software Developer	<input type="checkbox"/>	<input type="checkbox"/>

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<b>6</b>	<b>Contact information</b>	First name	Middle initial	Last name
	<b>A. Individual e-file</b>	Phone	Ext.	Fax
		First name	Middle initial	Last name
	<b>B. Business e-file</b>	Phone	Ext.	Fax
	<input type="checkbox"/> Check box if contact information same as Individual e-file			

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<b>7</b>	<b>About the participant</b>	<input type="checkbox"/> Certified Public Accountant (CPA or AICPA) #	
	(e.g., business owner or responsible official)	<input type="checkbox"/> Enrolled Agent #	
	(Check one)	<input type="checkbox"/> Attorney	
		<input type="checkbox"/> CTEC #	, surety bonding company
		<input type="checkbox"/> Other, specify	

**Submit your enrollment form**

Fax: (916) 845-0287  
Mail: e-file Program MS F284  
Franchise Tax Board  
PO Box 1468  
Sacramento CA 95812-1468  
Online: [www.ftb.ca.gov](http://www.ftb.ca.gov)

**For more information**

Web: [www.ftb.ca.gov](http://www.ftb.ca.gov)  
Email: [e-file@ftb.ca.gov](mailto:e-file@ftb.ca.gov)  
Phone: (916) 845-0353

# California e-file Program Participant Form Guidelines

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## General Information

Use this form to enroll as a participant in California's Individual and Business e-file Programs or to update your participant information. For quicker response, enroll online at [www.ftb.ca.gov](http://www.ftb.ca.gov). Search for **Join e-file**.

California operates its own e-file program, independent of the IRS e-file Program. We closely follow the IRS program procedures in administering our program.

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## Participation Requirements

Participants must currently be accepted in the IRS e-file Program and have a valid Electronic Filer Identification Number (EFIN). To transmit returns directly to us, participants must also have an Electronic Transmitter Identification number (ETIN). All participants must also comply with the requirements and specifications in FTB Pub. 1345, e-file Handbook for Authorized e-file Providers of California Tax Returns. Participants in the California Individual e-file Program must also comply with the requirements and specifications in FTB Pub. 1345A, Individual e-file Handbook Supplement and participants in the California Business e-file Program must comply with the requirements and specifications in FTB Pub. 1345B, Business e-file Handbook Supplement. We may cancel the enrollment of any participant who does not meet these requirements or does not keep his or her enrollment information current.

## When to Apply

We accept e-file enrollment forms year-round. You **do not** need to reapply each year, as long as you e-file at least one California return and your status with the IRS does not change.

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## Joining the Program

To enroll in the California e-file Program, complete Side 1 of the enrollment form and submit it to us. In addition:

- **Electronic Return Originators (EROs) and transmitters** must pass our suitability test.
  - **Software developers and transmitters** must pass a participant acceptance test (PATs) of their software.
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## INSTRUCTIONS

### Part 3: Identification Numbers

**EFIN** (all applicants)

Provide the six-digit EFIN the IRS assigned to you.

- If you have not received an EFIN, please wait until you receive your EFIN from the IRS to submit this form.
- If you have multiple EFINs, enter the one you will use to e-file California tax returns.

**ETIN** (transmitters and software developers only)

Provide the five-digit ETIN the IRS assigned to you.

- If you have not received an ETIN, please wait until after you receive your ETIN to submit this form.
- If you have multiple ETINs, enter the one you will use to e-file California tax returns.

**SSN/FEIN** (all applicants)

Provide the social security number or federal employer identification number that is associated with the IRS EFIN you provided above.

**PTIN** (only used by EROs who also prepare returns)

Provide your IRS-issued PTIN (Preparer Tax Identification Number).

### Part 5: Participant Types

Check the box or boxes that apply. If you participate in both Individual and Business e-file, check the appropriate box(es) in each column.

- **ERO** – EROs originate the submission of e-file returns using approved e-file software.
- **Transmitter** – Transmitters submit electronic tax return data directly to the FTB. Check your e-file software to determine if you transmit directly or through a third party.
- **Software Developer** – Software developers write and distribute e-file software that can be used by tax preparers, individual taxpayers, or business taxpayers.

### Part 6: Contact Information

- If you only participate in Individual e-file, complete Part 6A.
- If you only participate in Business e-file, complete Part 6B.
- If you participate in both, and the contact person is the same, enter the contact information in Part 6A, and check the box in Part 6B.
- If the contact information for Individual and Business e-file is different, complete both Part 6A and Part 6B.

### Part 7: About the Participant

- **Certified Public Accountants** must provide their license number from their state's Board of Accountancy or their member number from the American Institute of Certified Public Accountants (AICPA).
- **Enrolled Agents** must provide their IRS enrollment number.
- **CTEC certified preparers** must provide their California Tax Education Council identification number and the name of their bonding company.